

## Chapter 5 -- Adding Holdings

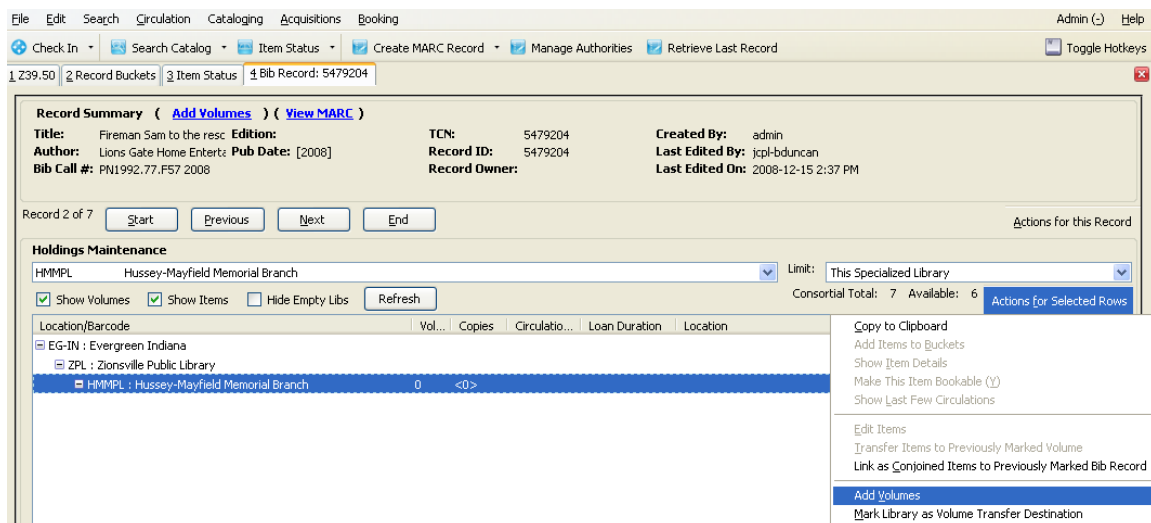
When cataloging in Evergreen Indiana, *always* do a thorough search for a matching title in the catalog before importing any new records. When a match is found in Evergreen, a new record should not be imported. Please attach your holdings to the existing record. If an existing record does not meet EI standards, please edit or overlay the record. See **Chapter 15 – Using the MARC Editor**, or **Chapter 14 – Overlaying Records**, if needed.

There are two settings options for adding holdings. With the default setting, adding and editing call numbers and item information occurs in two distinct steps. With the Unified Volume /Copy Creator/Editor, volume and copy information is added and edited on the same screen. Below are instructions for adding volumes with the default setting. See page 5.9 for instructions on adding volumes with the Unified Volume/Copy Creator.

### Adding Volumes

Search for your item in Evergreen. When you find a record which matches your item, click on the title to view the record. If you are not in the **Holdings Maintenance** view, switch to it by clicking on **Actions for this Record (Alt + R)** at the upper right. Select **Holdings Maintenance (Alt + H)** from the drop down list. **Chapter 3—Introduction to Holdings Maintenance**, if needed

Click your Branch name to highlight the branch line. Click on **Actions for Selected Rows (Alt + F)**, or right click on the Branch line. Select **Add volumes (Alt + V)** from the drop-down list:



The **Volume/Copy Creator** will open in a new tab:

9.50 2 Record Buckets 3 Item Status 4 Bib Record: 5479204 5 Add Volume/Item

**Record Summary ( View MARC )**  
Title: Fireman Sam to the resc  
Author: Lions Gate Home Enterts  
Bib Call #: PN1992.77.F57 2008  
Edition: [2008]  
TCN: 5479204  
Record ID: 5479204  
Record Owner:  
Created By: admin  
Last Edited By: jcpl-bduncan  
Last Edited On: 2008-12-15 2:37 PM

**Volume and Copy Creator**

Library	# of volumes	Classification	Prefix	Call Number	Suffix	# of Copies	Barcode / Part Design
HMMPL	1	Generic		PN1992.77.F57 2008		1	

**# of volumes** and **# of copies** will be automatically filled in. If you have multiple volumes or copies, see **Chapter 9 – Adding Holdings for Multiple Volumes**.

The **Classification** setting is preset to Generic. The **Prefix** and **Suffix** settings are optional. If you are using them, apply them now. **See Chapter 26 – Cataloging Related Admin Functions** for more information.

For information about the Part Designation dropdown, see **Chapter 25 – Managing Monographic Parts**.

Enter the call number into the **Call Number** box and your barcode in the **Barcode** box, then click **Edit then Create (Alt + C)**

Call Number: [ ] Suffix: <No Change> BATCH [Apply]

Call Number	Suffix	# of Copies	Barcode / Part Designation
DVD E FIREMAN	[ ]	1	33946002664782 [ ]

Create with Defaults Edit then Create

**NOTE:** If you click **Create with Defaults**, you will not get a chance to apply your item information. It will be added with a copy location of Stacks and no circ modifier.

**TIP:** You can click the call number drop down to see any other call number options from the MARC record.

A screenshot of a software interface showing a 'Call Number' dropdown menu. The current selection is 'PN1992.77.F57 2008'. A red circle highlights the dropdown arrow. Below the main menu, a list of alternative call numbers is displayed, with '791.45/75' selected and highlighted in blue. To the right, there are fields for 'Suffix' (set to '<No Change>') and '# of Copies' (set to '1'). A blue 'Apply' button is also visible.

You can select an option from the list and click **Apply** to enter it in the Barcode box. Then you can edit it as needed.

A screenshot of the software interface showing the 'Call Number' field now containing '791.45/75'. A green arrow points from the dropdown menu in the previous image to this field. The 'Apply' button is circled in red. Below the main form, a table shows the resulting call number and number of copies.

Call Number	Suffix	# of Copies
791.45/75	<No Change>	1

**TIP:** If you put a check in the **Use Checkdigit** box, the system will delete any spaces entered in the barcode and will give you an error message if you enter an invalid barcode.

A screenshot of the 'Volume and Copy Creator' form. It includes fields for 'Classification' (set to '<No Change>') and 'Prefix' (set to '<No Change>'). Below, there is a table for 'Library' and '# of volumes' with 'HMMPL' and '1' entered. Another 'Classification' field is set to 'Generic'. At the bottom, there are three checkboxes: 'Auto-Generate Barcodes?' (unchecked), 'Use Checkdigit' (checked and circled in red), and 'Print Labels?' (unchecked).

**NOTE:** If you don't enter a barcode, your call number will be added as a volume with no copies attached. See **Adding Items/Copies** on page 5.7 if you create a call number with no copies attached.

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When you click **Edit then Create**, the **Copy Editor** window will open:

The screenshot shows the 'Copies' window with a 'Record Summary' at the top. Below it is the 'Copy Editor' section with a 'Templates' dropdown set to 'Juvenile movies'. The main area is divided into four columns: Identification, Location (1), Circulation (2), and Miscellaneous (3). Each column contains several fields with values and a '1 copy' indicator. At the bottom right, there are 'Modify/Create Copies' and 'Close' buttons.

At this point you can apply your copy information.

Select the appropriate item template from the template drop down list, which appears above the volume entry fields.

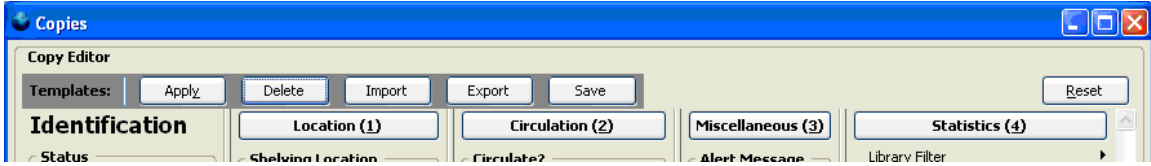
**TIP:** The last template you applied will be displayed in the template box, so if you are cataloging the same type of item, you will not have to select the template from the list.

This screenshot shows the 'Copies' window with the 'Templates' dropdown menu open. The menu lists various item templates such as 'Juvenile audiobooks', 'Juvenile fiction', 'Juvenile kits', 'Juvenile magazines', 'Juvenile movies', 'Juvenile music cds', 'Juvenile nonfiction', 'Juvenile oversized fiction', 'Juvenile prof. collection', 'Juvenile reference', 'Juvenile software', 'Large print books, 500+', 'Large print books', 'Leveled Readers', 'Newbery Books', 'On order Adult audiobooks', 'On order Adult books, 500+ pages', 'On order Adult books', and 'On order Adult fiction Blu-ray'. The 'Juvenile movies' option is highlighted. A red circle highlights the dropdown arrow. The background fields are partially visible.

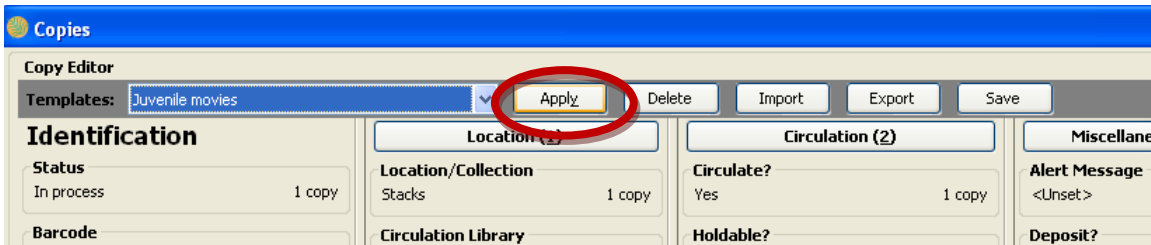
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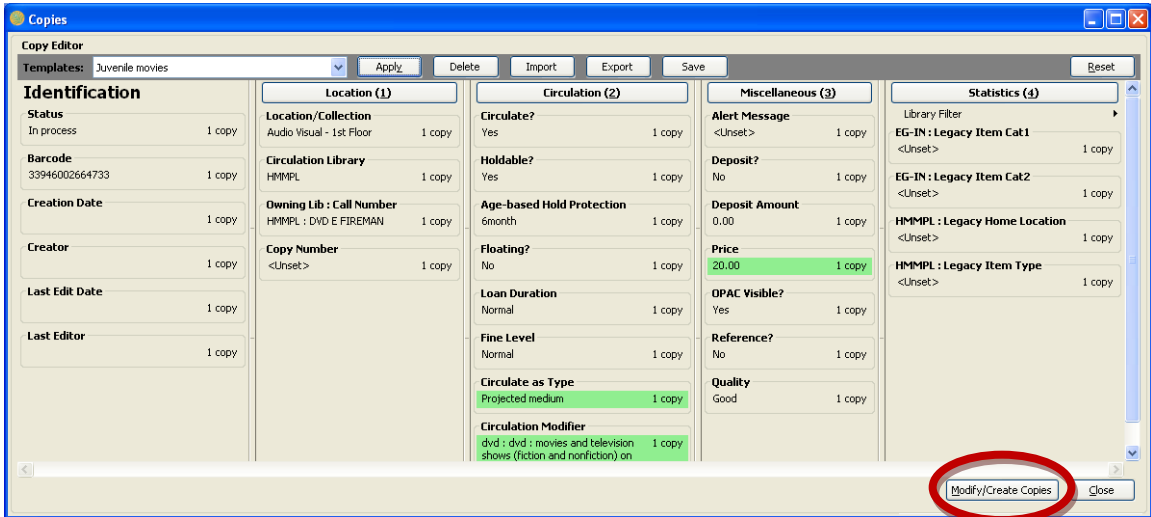
**NOTE:** If your template bar has no template drop down box, as shown below, you have not created any templates. See **Chapter 6 – Item Templates**.



Once the correct template name appears in the Template box, click the **Apply (Alt + Y)** button.



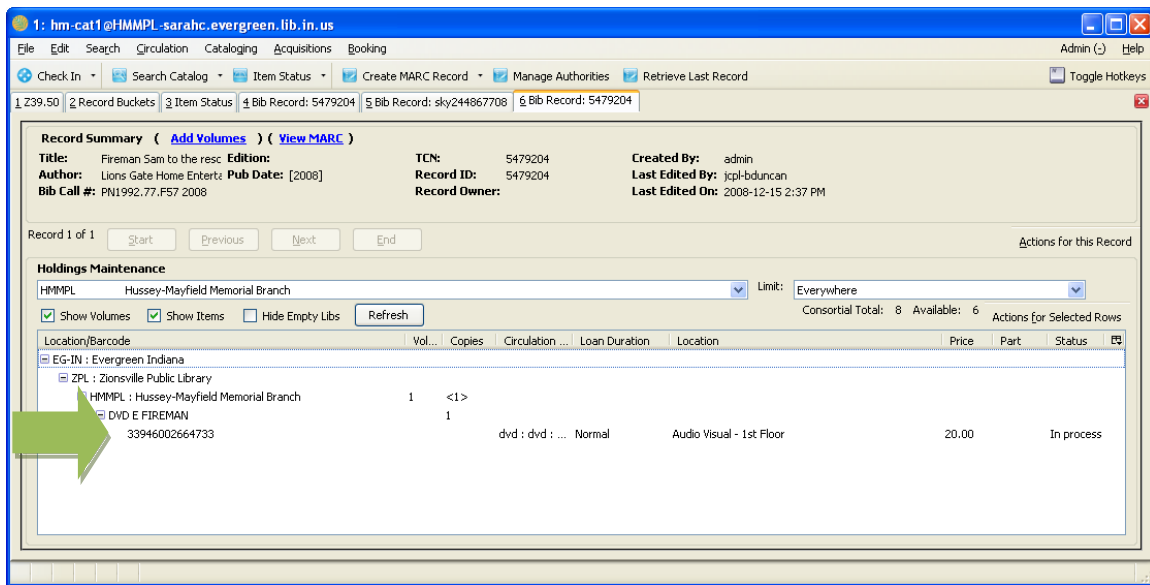
Your template will be applied. Make any other desired changes to the item information. See **Chapter 7--Using the Copy Editor** for more information if needed. Then click the **Modify/Create Copies (Alt + M)** button.



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You will now return to the Holdings Maintenance screen, and your new item information will be displayed:



The screenshot shows the 'Record Summary' for a DVD titled 'Fireman Sam to the resc.' by Lions Gate Home Entert. The record ID is 5479204. Below the summary is the 'Holdings Maintenance' section, which includes a table of holdings. A green arrow points to the first row of the table, which is highlighted. The table has columns for Location/Barcode, Vol., Copies, Circulation, Loan Duration, Location, Price, Part, and Status.

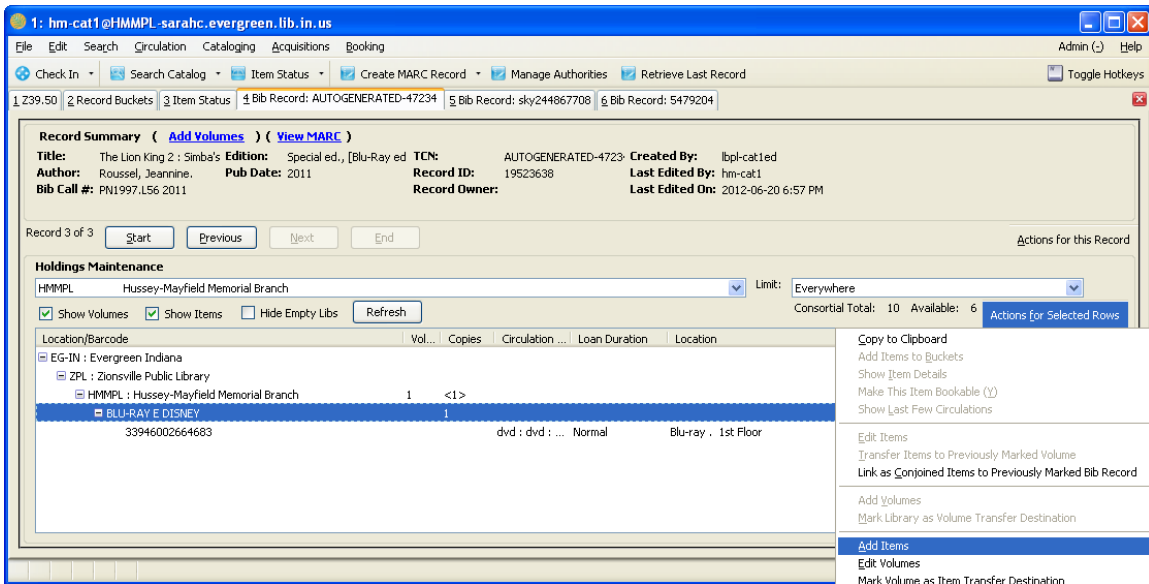
Location/Barcode	Vol...	Copies	Circulation	Loan Duration	Location	Price	Part	Status
EG-IN : Evergreen Indiana ZPL : Zionsville Public Library HMMPL : Hussey-Mayfield Memorial Branch DVD E FIREMAN 33946002664733	1	<1>			dvd : dvd : ... Normal Audio Visual - 1st Floor	20.00		In process

**NOTE:** If you close the window instead of clicking Modify/Create Copies, then your item will be created with the default information. If you do this and you need to edit your item, highlight the barcode line and right-click or from **Actions for Selected Rows (Alt + F)** to select **Edit Items (Alt + E)**. See **Chapter 7 – Using the Copy Editor**, if needed.

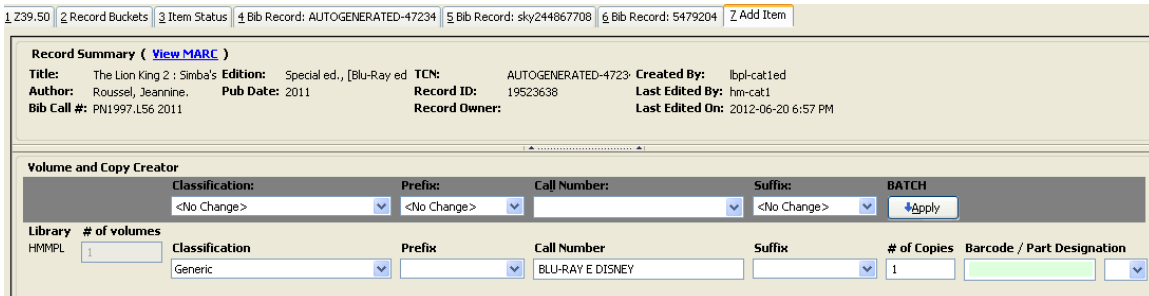
## Adding Items/Copies

In some cases, such as when you add a second copy at a later date, or when you have created a call number without adding your volume, the call number you need will already be attached to the record. If that's the case, you will need to Add Items rather than Add Volumes.

Highlight the call number where you wish to attach your copy, and either right-click or click **Actions for Selected Rows (Alt + F)**. Then select **Add Items (Alt +A)**



The Volume and Copy Creator will open in a new tab. The call number you highlighted will appear in the call number box, and the # of Volumes box will be grayed out.



**TIP:** If you want to add more than one copy, you can change the number in the # of Copies box and more Barcode boxes will appear.

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Enter your barcode and click **Edit then Create (Alt + C)**.

The screenshot shows a cataloging form with the following fields and controls:

- Call Number:** A dropdown menu.
- Suffix:** A dropdown menu with the value "<No Change>".
- BATCH:** A button labeled "Apply".
- Call Number:** A text input field containing "BLU-RAY E DISNEY".
- Suffix:** A dropdown menu.
- # of Copies:** A text input field containing "1".
- Barcode / Part Designation:** A text input field containing "33946002664741".
- Buttons:** "Create with Defaults" and "Edit then Create" (circled in red).

The Copy Editor will open:

The screenshot shows the 'Copies' window with the following information:

**Record Summary ( View MARC )**

**Title:** The Lion King 2 : Simba's Edition: Special ed., [Blu-Ray ed. TCN: AUTOGENERATED-4723- Created By: lbpl-cat-led

**Author:** Roussef, Jeannine. **Pub Date:** 2011 **Record ID:** 19523638 **Last Edited By:** hm-cat1

**Bib Call #:** PN1997.L56 2011 **Record Owner:** **Last Edited On:** 2012-06-20 6:57 PM

**Copy Editor**

Templates: Juvenile music cds [Apply] [Delete] [Import] [Export] [Save] [Reset]

Identification	Location (1)	Circulation (2)	Miscellaneous (3)	Statistics (4)
<b>Status</b> In process 1 copy	<b>Location/Collection</b> Stacks 1 copy	<b>Circulate?</b> Yes 1 copy	<b>Alert Message</b> <Unset> 1 copy	<b>Library Filter</b> EG-IN : Legacy Item Cat1 <Unset> 1 copy
<b>Barcode</b> 33946002664741 1 copy	<b>Circulation Library</b> HMMPL 1 copy	<b>Holdable?</b> Yes 1 copy	<b>Deposit?</b> No 1 copy	<b>EG-IN : Legacy Item Cat2</b> <Unset> 1 copy
<b>Creation Date</b> 1 copy	<b>Owning Lib : Call Number</b> HMMPL : BLU-RAY E DISNEY 1 copy	<b>Age-based Hold Protection</b> <Unset> 1 copy	<b>Deposit Amount</b> 0.00 1 copy	<b>HMMPL : Legacy Home Location</b> <Unset> 1 copy
<b>Creator</b> 1 copy	<b>Copy Number</b> <Unset> 1 copy	<b>Floating?</b> <Unset> 1 copy	<b>Price</b> 0.00 1 copy	<b>HMMPL : Legacy Item Type</b> <Unset> 1 copy
<b>Last Edit Date</b> 1 copy		<b>Loan Duration</b> Normal 1 copy	<b>OPAC Visible?</b> Yes 1 copy	
<b>Last Editor</b> 1 copy		<b>Fine Level</b> Normal 1 copy	<b>Reference?</b> No 1 copy	
		<b>Circulate as Type</b> <Unset> 1 copy	<b>Quality</b> Good 1 copy	
		<b>Circulation Modifier</b> <Unset> 1 copy		

[Modify/Create Copies] [Close]

At this point you can apply your templates and item attributes as needed and create your copy. Return to page 5.4 for further direction if necessary.

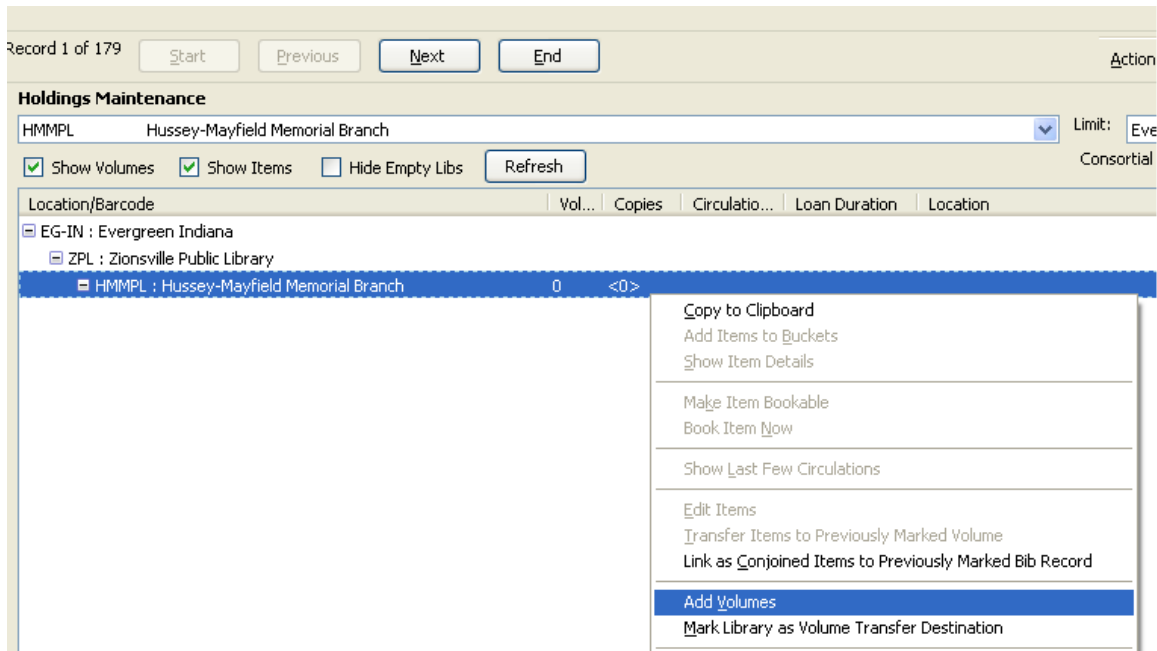


## Adding Holdings with the Unified Volume/Copy Creator

The Unified Volume/Copy Creator/Editor is an optional setting that can be set for your branch or library system in the Local Admin settings. See **Chapter 26—Cataloging Related Admin Functions** for information on how to change to this setting.

Search for your item in Evergreen. When you find an existing record which matches your item, click on the title to view the record. If you are not in the **Holdings Maintenance** view, switch to it by clicking on **Actions for this Record (Alt + R)** at the upper right. Select **Holdings Maintenance (Alt + H)** from the drop down list. See **Chapter 3—Introduction to Holdings Maintenance** if needed.

Click your Branch name to highlight the branch line. If the call number you need is already attached to this record for your library, see **Adding Items/Copies** on page 5.7. Click on **Actions for Selected Rows (Alt + F)**, or right click on the Branch line. Select **Add volumes (Alt + V)** from the drop-down list:



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The Unified Volume/Copy Creator will open up:

The screenshot shows the 'Record Summary' for a book titled 'Living and working in space' by Helen Whittaker. The record ID is 15931835. The 'Volume and Copy Creator' section is active, showing a table with one volume entry. The volume is classified as 'Generic' with a call number 'TL1500.W497 2011' and one copy. The interface includes various tabs like 'Circulation', 'Cataloging', and 'Acquisitions', and a 'Copy Viewer' section with sub-tabs for 'Identification', 'Location (1)', 'Circulation (2)', 'Miscellaneous (3)', and 'Statistics (4)'.

Library	# of volumes	Classification	Prefix	Call Number	Suffix	# of Copies	Barcode / Part Designation
HMMPL	1	Generic		TL1500.W497 2011		1	

Enter your volume information in the top half of the screen.

This close-up shows the 'Volume and Copy Creator' section. The 'Classification' is 'Generic', the 'Prefix' is empty, and the 'Call Number' is 'j629.45 WHITTAKER'. The 'Suffix' is empty and the 'BATCH' is '<No Change>'. The table below shows one volume entry with a call number of 'j629.45 WHITTAKER', a suffix of empty, and one copy. The barcode is '33946002653702'.

Library	# of volumes	Classification	Prefix	Call Number	Suffix	# of Copies	Barcode / Part Designation
HMMPL	1	Generic		j629.45 WHITTAKER		1	33946002653702

**# of volumes** and **# of copies** will be automatically filled in. For more information, see **Chapter 9 – Adding Holdings for Multiple Volumes**.

The **Classification** setting is preset to Generic. The **Prefix** and **Suffix** settings are optional. If you are using them, apply them now. **See Chapter 26—Cataloging Related Admin Functions** for more information.

Enter the call number into the **Call Number** box and your barcode in the **Barcode** box:

Call Number	Suffix	# of Copies	Barcode / Part Designation
j 629.45 WHITTAKER		1	33946002653702

**NOTE:** When you open the Volume/Copy Editor, the Call Number box may be automatically filled in call number information from the MARC record. You can edit this information as desired, or clear the box to enter your own call number.

**TIP:** You can also click the call number drop down to see any other call number options from the MARC record.

The screenshot shows the 'Call Number' field with '629.45' and a dropdown arrow circled in red. Below it, a dropdown menu is open, listing 'TL1500.W497 2011' and '629.45' (which is highlighted in blue). To the right, the 'Suffix' field contains '<No Change>' and the 'BATCH' field has an 'Apply' button.

You can select an option from the list and click **Apply** to enter it in the Barcode box. Then you can edit it as needed.

The screenshot shows the 'Apply' button in the 'BATCH' field circled in red. Below it, a table has a 'Call Number' field containing '629.45', a 'Suffix' field with a dropdown arrow, a '# of Copies' field with '1', and a 'Barcode / Part Designa' field with '33946002653702'. A green arrow points from the 'Apply' button to the 'Call Number' field in the table.

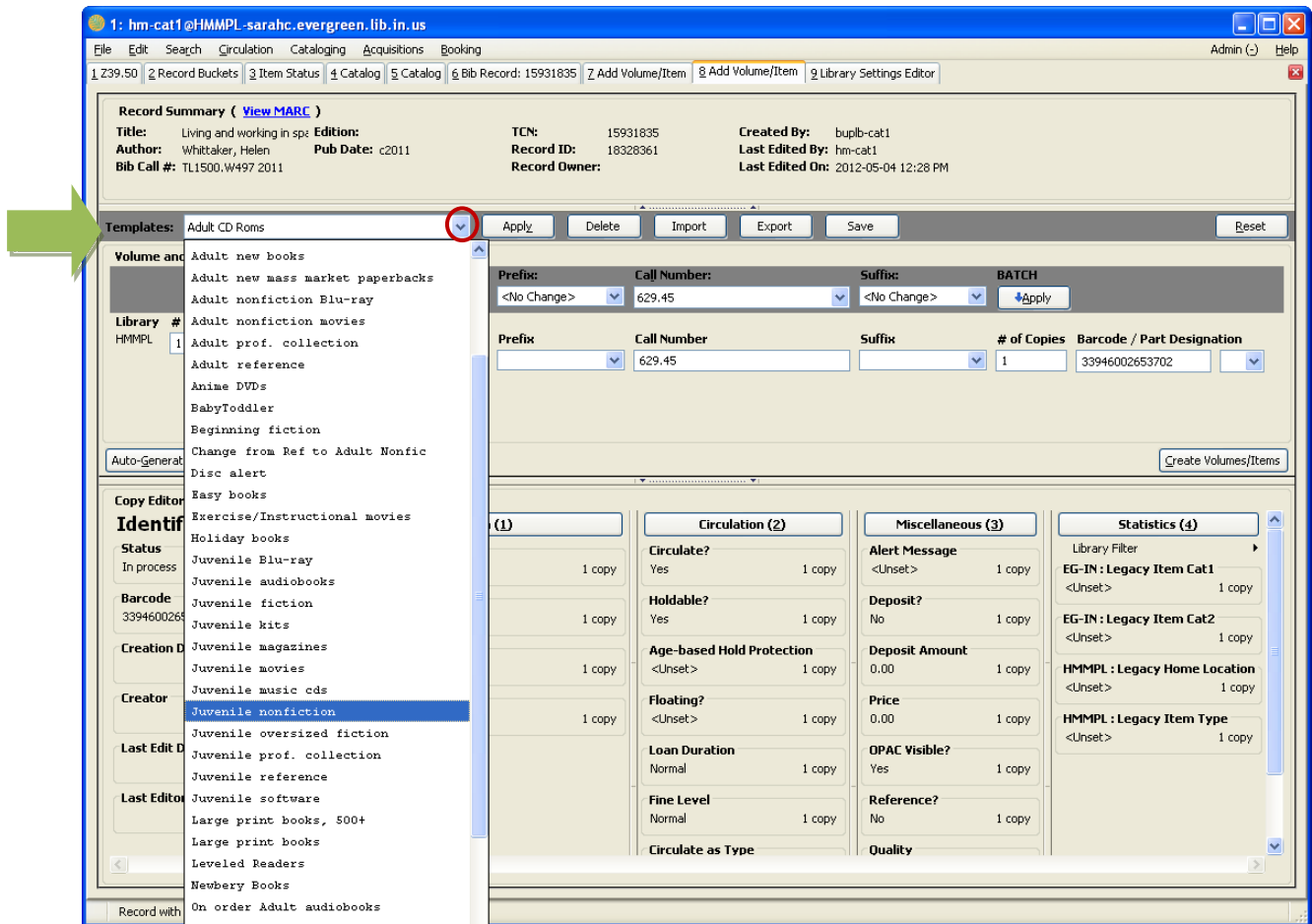
**NOTE:** Do not click Create Volumes Items (Alt + C) button at this point, or your item will be created with the default copy values. If you do this and you need to edit your item, highlight the barcode line and right-click or from **Actions for Selected Rows (Alt + F)** to select **Edit Items (Alt + E)**. See **Chapter 7 – Using the Copy Editor**, if needed.

## Adding Copy Information with the Unified Volume/Copy Creator

At this point you can apply your copy information.

**NOTE:** You can't apply copy templates or edit copy information until you have entered a barcode.

Select the appropriate item template from the template drop down list, which appears above the volume entry fields.



**NOTE:** If no templates appear in the list, see **Chapter 6--Copy Templates**.

Once the correct template name appears in the Template box, click the **Apply (Alt + Y)** button.

Library	# of volumes	Classification	Prefix	Call Number	Suffix
HMMPL	1	Generic		629.45	

Your template will be applied. Make any other desired changes to the item information. See **Chapter 7--Using the Copy Editor** for more information if needed. Then click the **Create/Volumes Items (Alt + C)** button.

Location (1)	Circulation (2)	Miscellaneous (3)	Statistics (4)
Location/Collection: Non-Fiction - 1st Floor 1 copy	Circulate? Yes 1 copy	Alert Message: <Unset> 1 copy	Library Filter
Circulation Library: HMMPL 1 copy	Holdable? Yes 1 copy	Deposit? No 1 copy	EG-IN : Legacy Item Cat1 <Unset> 1 copy
Owning Lib : Call Number 1 copy	Age-based Hold Protection 6month 1 copy	Deposit Amount 0.00 1 copy	EG-IN : Legacy Item Cat2 <Unset> 1 copy
Copy Number 1 1 copy	Floating? <Unset> 1 copy	Price 28.50 1 copy	HMMPL : Legacy Home Location <Unset> 1 copy
	Loan Duration Normal 1 copy	OPAC Visible? Yes 1 copy	HMMPL : Legacy Item Type <Unset> 1 copy
	Fine Level Normal 1 copy	Reference? No 1 copy	
	Circulate as Type <Unset> 1 copy	Quality Good 1 copy	
	Circulation Modifier book : book : monograph 1 copy		

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The tab will close and your Volume and Copy will be created:

**Record Summary** ( [Add Volumes](#) ) ( [View MARC](#) )

**Title:** Living and working in sp... **Edition:** **TCN:** 15931835 **Created By:** buplb-cat1  
**Author:** Whittaker, Helen **Pub Date:** c2011 **Record ID:** 18328361 **Last Edited By:** buplb-cat1  
**Bib Call #:** TL1500.W497 2011 **Record Owner:** **Last Edited On:** 2010-10-01 10:55 AM

Record 1 of 179     [Actions for this Record](#)

**Holdings Maintenance**

HMMPL Hussey-Mayfield Memorial Branch

Show Volumes  Show Items  Hide Empty Libs

Location/Barcode	Volumes	Copies	Circulation Mo...	Loan Duration	Location	Price	Part	Status
EG-IN : Evergreen Indiana								
ZPL : Zionsville Public Library								
HMMPL : Hussey-Mayfield Memorial Branch	1	<1>						
j 629.45 WHITTAKER		1						
33946002653702			book : book : m...	Normal	Non-Fiction - 1st Floor	28.50		In process

**NOTE:** When you close the Volume Editor, the right most tab will be displayed, so if you opened the Volume Editor from a Tab that is not the right-hand most (highest numbered) tab, you will need to click on the tab with the correct record to see your holdings.